SPECIAL CHRIS UPGRADE BULLETIN
05/08/2000

CHRIS HR Users' Conference Call

The next CHRIS HR users' conference call is scheduled for Wednesday, May 17, 2000, from 2:00 pm until 3:00 pm to discuss the upgrade and answer questions. The dial-in number is (700) 991-2748, conferee access code = 33015. For those callers not using FTS2000, the Conference ID number is M58961. Because of the limitation on the number of lines available for the call, please try to meet together for the call and limit calls to one from each geographic location.

CHRIS Upgrade Schedule

Below is the CHRIS upgrade schedule along with the impact and/or recommended actions by users.

DATES	CHRIS ACTIVITY	IMPACT/ACTION
4/23/00 - 5/18/00	Freeze additions or changes to user IDs and passwords for HR and TR users	(1) No new IDs will be established. (2) No modifications to user ID profiles. (3) Users should not change passwords.
4/23/00 - 5/20/00	Freeze organizational tree changes and subagency name changes in CHRIS	Realignments, reassignments, and similar actions involving changes to the organization structure are frozen.
5/09/00	**CHRIS shuts down at 8:00 p.m. Eastern time.**	**-Users should complete entry of actions effective 5/06/00 and earlier and/or change actions in REQ to HR.** **-Users may enter personnel actions effective 05/07/00 through 05/20/00.**
5/10/00 – 5/18/00	Upgrade of CHRIS to PeopleSoft version 7.51. System is shutdown to all HR and Training users.	-All users should delete cache files (see instructions below). -Users should review new features described in this special upgrade bulletin. -Users will need to review list of ad-hoc private queries provided to determine if modifications are needed due to the name change to SSN (now National ID) and Earnings Program (now Pay Plan) fields. -Use DOEInfo to view information on employees and run reports. -CHRIS IM staff must install new files on the server (or desktop).

DATES	CHRIS ACTIVITY	IMPACT/ACTION
5/17/00	-CHRIS HR users' conference call -Issuance of updated HR Users' Manual on website	-Conference call scheduled from 2:00 pm to 3:00 pm.
5/19/00	**Completion of upgrade.**	**CHRIS available to all users for processing personnel and training transactions.**
5/24/00		Last day to enter personnel actions effective on or before 05/20/00 in CHRIS.

Deletion of Cache Files Before Initial Signon to CHRIS 7.51

We are recommending that each user delete their cache files before logging on to CHRIS 7.51 for the first time to avoid possible serialization errors.   Below are the steps.

1. If you are in CHRIS, exit by closing all open CHRIS windows. If you fail to close all open CHRIS windows, you will get a "Cannot access these files" error.

2. Go into Windows Explorer and locate the following directory: C:\PS\CACHE\

3. Highlight the CHRIS folder, and press the delete key. Answer "yes" to delete. (The cache files will create a new CHRIS folder upon initialization.)

If you have any questions, please contact the CHRIS Technical Hotline at 304-285-4729.

HR Processing Differences

Attachment #1 provides advance information and/or screen prints of the following HR-related changes to CHRIS:

- Position Data Panels
- Administer Workforce
- Reports

The CHRIS HR Users' Manual will be posted to the CHRIS web site by May 17 and will incorporate these changes. In addition, a crosswalk will be provided of the new location of the fields on the position data panels. If you have questions about this information, please contact the CHRIS Functional Hotline on (412) 386-5190.
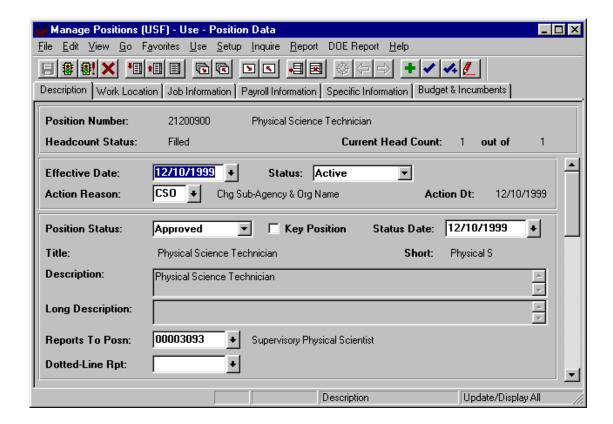
Impact on Ad-Hoc Queries

As a result of the renaming of two fields by PeopleSoft (SSN changed to National ID; Earned Program changed to Pay Plan), any private Crystal/Excel queries developed using these two fields either as an element or in the criteria will need to be updated with the correct field names. The old field names will be automatically dropped from the ad-hoc query.

When the upgrade is completed, only the "N_DOE_Employees" table will be available for CHRIS HR users to run queries. The "Employees" table will be removed since it has been obsolete since last April (see CHRIS HR Bulletin #22, dated 04/16/99) when users were requested to convert their queries to run against the N_DOE_Employees table. A list of all private ad-hoc queries developed by each site will be provided later this week to the CHRIS HR POC. Once the upgrade has been completed, users should review any ad-hoc queries, if provided, and make the appropriate changes to the query to incorporate one or both of the new fields.
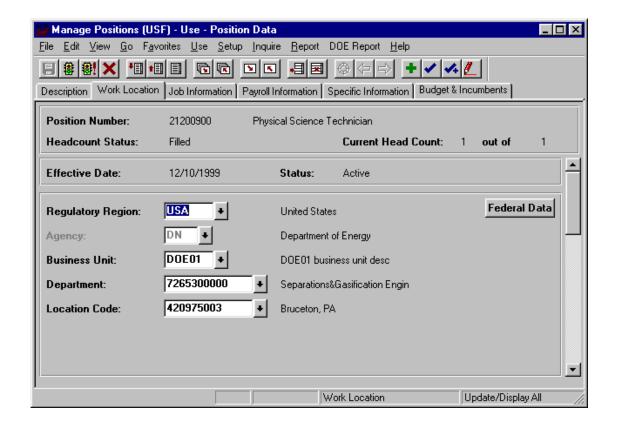
HR Processing Differences from 7.0 to 7.51

POSITION DATA

- The position data panels have been redesigned and renamed. They are now labeled:

    - **Description**
    - **Work Location**
    - **Job Information**
    - **Payroll Information**
    - **Specific Information**
    - **Budget & Incumbents.**

- Within the **Work Location**, **Job Information** and **Specific Information** panels are <u>subpanels</u> labeled **Federal Data.** All of the fields previously used in version 7.0 are still used in this version, but have been moved into a more organized path for data entry.

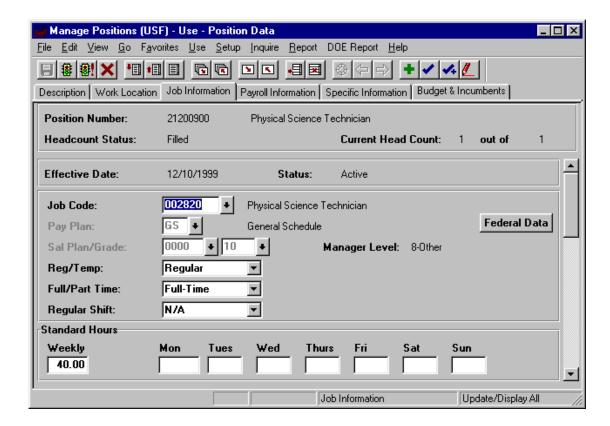- The **Description** panel stores the classification approval dates and the position to which the position being created or modified reports to.
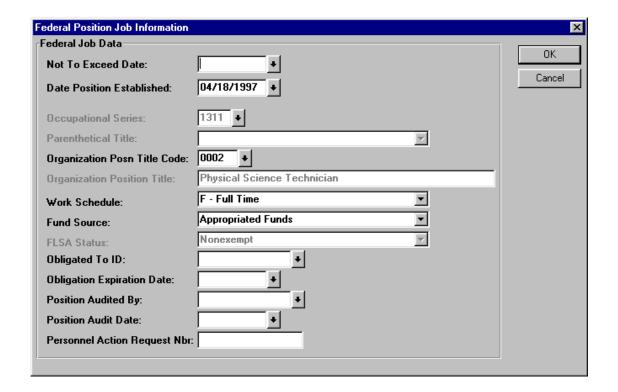
- The **Work Location** panel identifies the location of the position.

- The **Federal Data** subpanel within the **Work Location** panel identifies whether the position is located in the Field or Headquarters.

- The **Job Information** panel stores the specifics of the position.

Federal Position Job Information

Federal Job Data

Field	Value
Not To Exceed Date:	
Date Position Established:	04/18/1997
Occupational Series:	1311
Parenthetical Title:	
Organization Posn Title Code:	0002
Organization Position Title:	Physical Science Technician
Work Schedule:	F - Full Time
Fund Source:	Appropriated Funds
FLSA Status:	Nonexempt
Obligated To ID:	
Obligation Expiration Date:	
Position Audited By:	
Position Audit Date:	
Personnel Action Request Nbr:	

OK   Cancel

- The **Federal Data** subpanel within the **Job Information** panel also stores the specifics of the position.

- Notice that it displays the work schedule on both panels and it is important that the user selects/enters the work schedule on both the **Job Information** and **Federal Data** panels.

- The **Payroll Information** panel is where Bargaining Unit and payroll specific information is entered. The Bargaining Unit defaults to "8888" and this field must be updated by users, as appropriate.

Manage Positions (USF) - Use - Position Data

File Edit View Go Favorites Use Setup Inquire Report DOE Report Help

| Description | Work Location | Job Information | Payroll Information | Specific Information | Budget & Incumbents |

Position Number: 21200900   Physical Science Technician

Headcount Status: Filled   **Current Head Count:**   1   out of   1
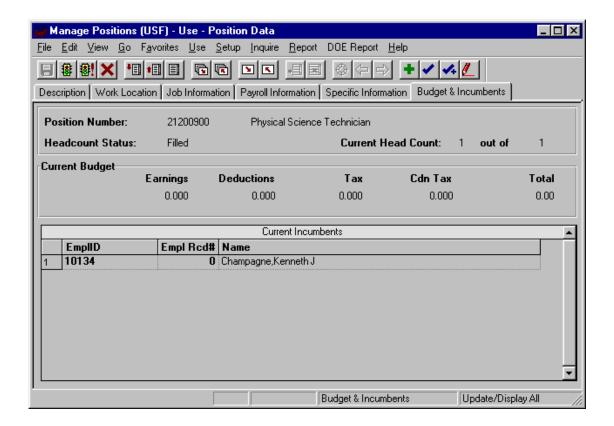
Effective Date: 12/10/1999   **Status:**   Active

Max Head Count: 1

Mail Drop ID: ☑ **Budgeted Position**

Work Phone: ☐ **Confidential Position**

Health Certificate: ☐ **Job Sharing Permitted**

Signature Authority: **Federal Data**

Calc Group: **FTE:**   ☐ **Adds to FTE Actual Count**

Position Pool ID: **Classified/Unclassified Indc:**   C

Academic Rank: **Encumbrance Indicator:**   I

Specific Information   Update/Display All

- The **Specific Information** panel fields are not currently used.

Federal Position Specific Information

Position Occupied

Position Occupied:	1 - Competitive
Sensitivity Code:	1- Non Sensitive
Security Clearance:	0 - Not Required
LEO Position:	N - Not Applicable
Language:	English
Performance Plan:	
Training Program:	
Competitive Area:	MP
Competitive Level:	033
Staff or Line Position:	L
Target Grade:	11

☐ Seasonal   ☐ Mobility Position Indicator
☐ Drug Test Required   ☐ Procurement Integrity Act Posn
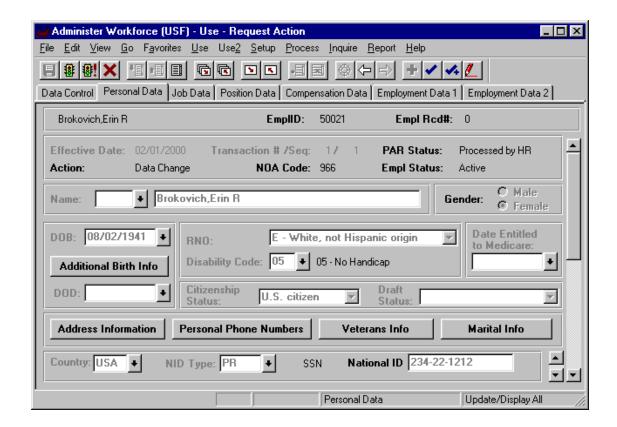☐ Intelligence Position   ☐ Presidential Appointment Posn

OK   Cancel

- The **Federal Data** subpanel within the **Specific Information** panel stores additional position information such as Position Occupied, Comp Area, Comp Level, and Target Grade.
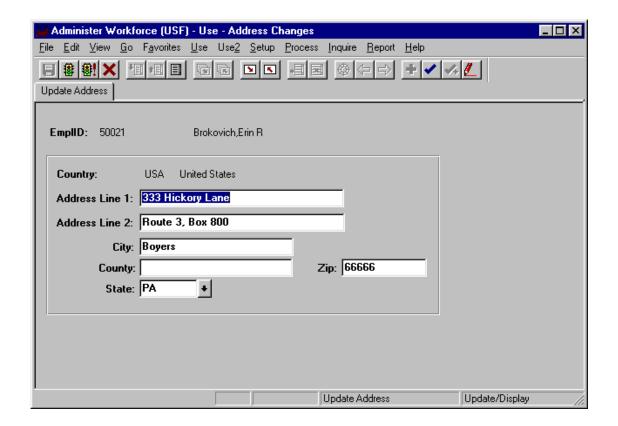
- The **Budget & Incumbents** panel is a view only panel and it displays the current incumbent(s) of the position.
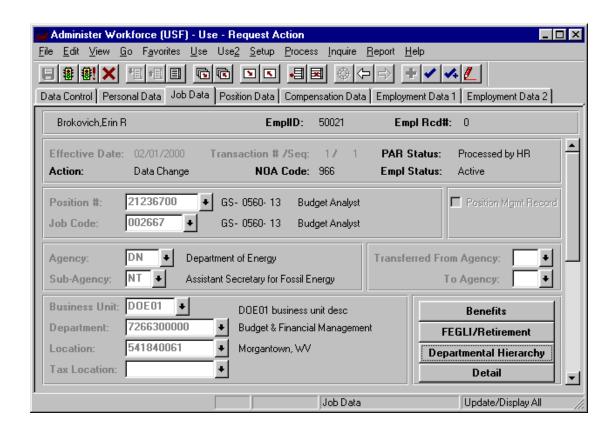
ADMINISTER WORKFORCE

- The following field labels have changed:
    - **SSN** now **National ID (**abbreviated as **NID**)
    - **Earnings Program** now **Pay Plan**

- When searching for a valid value for a field with a search option (Ctrl+F4) and the search is an <u>exact</u> match of a record/field in the database, the system will automatically open the record or pull the information into the field instead of displaying a list. **Note:** Users will need to verify that what automatically populated is the appropriate data before saving the action.

- Once a hire action is entered and the PAR Status is changed to **HR**, the system will automatically take the user into the **Education** panel to enter the required education data. This feature should reduce the missing education errors in the Department's CPDF report.

- A new field labeled **Business Unit** will appear on various panels. This field will always default to **DOE01.** This is the only value that this field will accept at the present time.
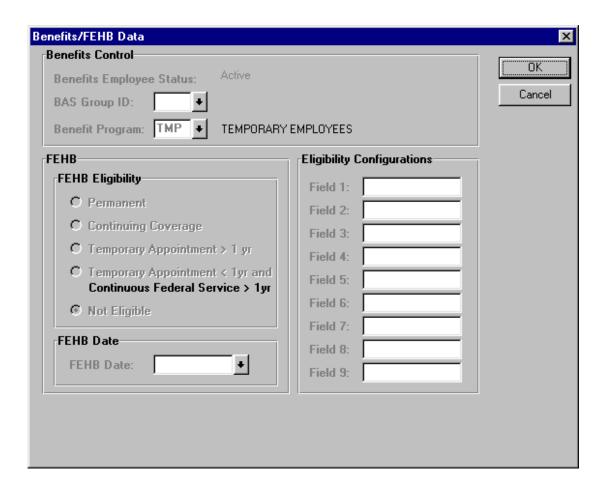
- The **Personal Data** panel has been redesigned, it now displays **Marital Info** under its own subpanel. As in 7.0 we recommend that marital info <u>not </u>be tracked in CHRIS.

- A new field has also been added to this panel: **DOD – Date of Death**.

```
Administer Workforce (USF) - Use - Address Changes                    _ □ ×

File  Edit  View  Go  Favorites  Use  Use2  Setup  Process  Inquire  Report  Help

[toolbar icons]

┌ Update Address ┐

   EmplID:  50021              Brokovich,Erin R

   ┌──────────────────────────────────────────────────────────┐
   │ Country:        USA    United States                     │
   │ Address Line 1: [333 Hickory Lane          ]             │
   │ Address Line 2: [Route 3, Box 800          ]             │
   │         City:   [Boyers          ]                       │
   │       County:   [              ]       Zip: [66666    ]  │
   │        State:   [PA      ▼]                               │
   └──────────────────────────────────────────────────────────┘

                                    Update Address      Update/Display
```
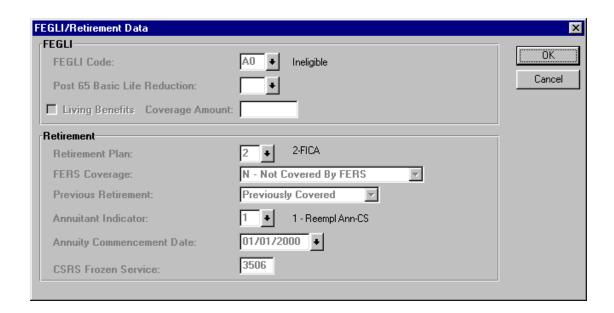
- A **Change of Address** is processed under the following path: *Administer Workforce>Use>Address Changes*
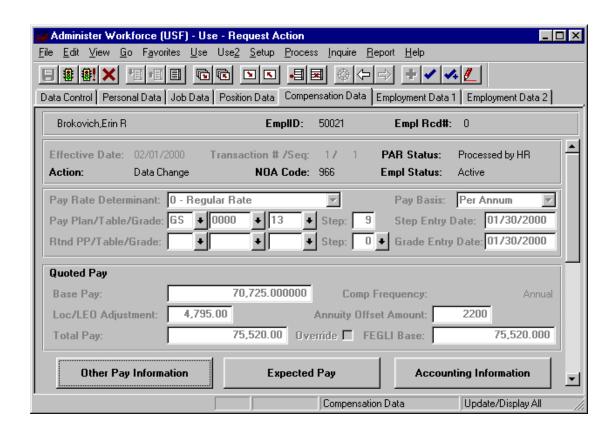
- The **Job Data** panel now has four subpanels:
  - **Benefits**
  - **FEGLI/Retirement**
  - **Departmental Hierarchy** (no change from 7.0)
  - **Detail** (currently not used)

Benefits Control

Benefits Employee Status: Active

BAS Group ID: [   ] ▾

Benefit Program: [TMP] ▾   TEMPORARY EMPLOYEES

OK

Cancel

FEHB

FEHB Eligibility

○ Permanent

○ Continuing Coverage

○ Temporary Appointment > 1 yr

○ Temporary Appointment < 1yr and
   Continuous Federal Service > 1yr

◉ Not Eligible

FEHB Date

FEHB Date: [   ] ▾

Eligibility Configurations

Field 1: [   ]

Field 2: [   ]

Field 3: [   ]

Field 4: [   ]

Field 5: [   ]

Field 6: [   ]

Field 7: [   ]

Field 8: [   ]

Field 9: [   ]

- The **Benefits** subpanel stores the FEHB information.

- The **FEGLI/Retirement** Subpanel stores the life insurance and retirement information.
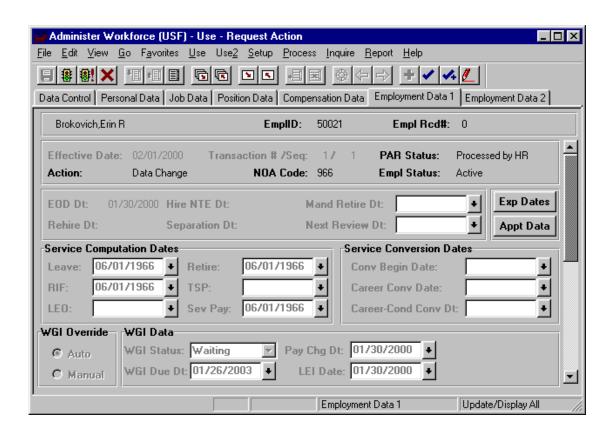

- The **Compensation Data** panel now has three subpanels:
  - **Other Pay Information**
  - **Expected Pay** (no change)
  - **Accounting Information** (no change).

- The **Annuity Offset Amount** now appears on the **Compensation Data** panel and users will now have the capability of accessing the field to process the required NOAC 966 action used to update the annuity offset amount without assistance from the Functional Hotline.

- Former pay plan **EX1** employees who retained ES (SES) pay and benefits have been converted from pay plan EX1 to **EX**.

- All pay tables for **GM** employees have been converted to the following and will reflect so in all CHRIS tables:

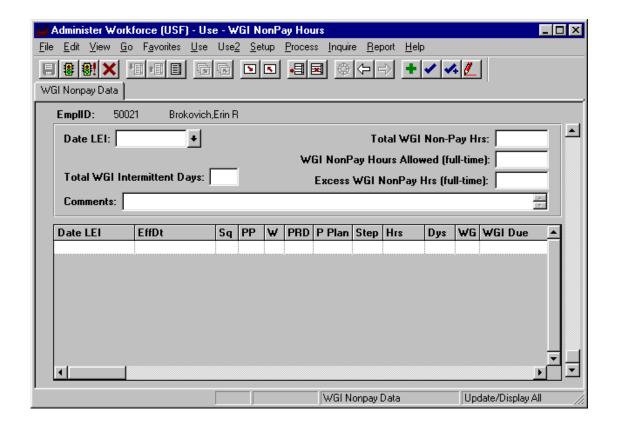| Old Pay Table	New Pay Table
GM00	0000
M220	0220
M290	0290
M329	0329
M331	0331
M485	0485
M499	0499

- The **Other Pay Information** subpanel is where Earnings Code(s) are entered such as Retention Allowances, Supervisory Differential, AUO, Availability Pay, Staffing Differential, etc.
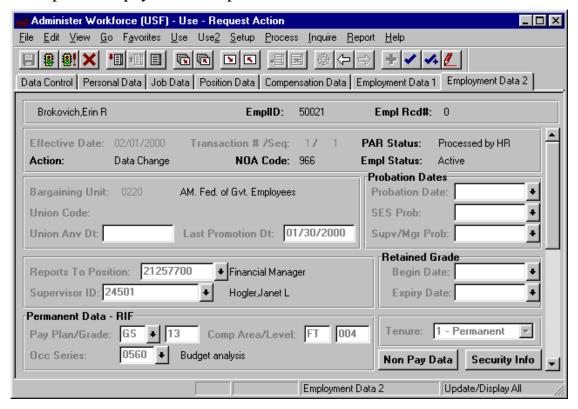

- The **WGI Non-Pay Hours** and **Intermittent Days Worked** will no longer display on the **Employment Data 1** panel. The WGI Non-Pay Hours and

Intermittent Work Days can be viewed under the following path: *Administer Workforce>Use>WGI Non-Pay Hours*

- The **WGI Non-Pay Hrs** and **WGI Intermittent Days** are updated on a bi-weekly basis. This panel displays the Total Non-Pay hours and WGI Intermittent Days during the WGI waiting period. It also displays a bi-weekly subtotal and total of both of these fields. This data is display only and will be helpful when determining whether a WGI should be withheld for an employee that has excess of allowable non-pay hours or whether an employee has worked the required intermittent days to become eligible for a WGI.

- The pay period totals represent the non-pay hours and intermittent days beginning September 27, 1998.

- **Note**: When an employee who has a balance in either of these fields receives an equivalent increase (Within Grade Increase, Promotion, etc.) the balance will be automatically reset to zeros on the Friday following the end of the pay

period in which the equivalent increase is effective. This is accomplished when the passback payroll file is processed.

- The **Bargaining Unit**, and **Union Code** on the **Employment Data 2** panel are grayed out fields. The Bargaining Unit field is determined on the Position Data panels and will automatically populate based on the selection of the position being used for the action. **Union Code** is not currently tracked in CHRIS.

REPORTS

- The **Terminations Report** will now include employees from a prior and current subagency within DOE.   In version 7.0, the report would only generate a list of those employees who separated in the most current subagency tied to the security of your userid. In version 7.51 the report will generate a list of separations that will include employees from the subagency before the change and the current subagency.

  Example: In December of 1999, a subagency change was processed to change FETC (FT) to NETL (NT). In 7.51 when the terminations report is generated and the criteria dates include a timeframe prior to December 1999 (for example: 06-30-99 to 04-30-00), it will now include employees who separated under the old subagency.